

# Air & Fluid Filters

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## US Industry Study with Forecasts for 2020 & 2025

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Study #3379 | April 2016 | \$5500

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Sales gains for air and fluid filters in the US will be fueled by further strength in manufacturing activity and construction expenditures, as well as by rising consumer concern with domestic indoor air quality and tap water purity. In addition, continued trends toward the incorporation of “smart” features and complementary monitoring devices indicating filter replacement time and toward specialized, industry-specific filtration media will support per unit value gains.

### Air washer & cartridge air filters to boast fastest gains

Of the two primary product segments, fluid filters held over three-fifths of demand in 2015. Nevertheless, among product types the fastest market gains through 2020 will be seen in air washer and cartridge air filters, buoyed by accelerating production of air pollution control equipment. Advances in sales of air washer filters will be fueled by environmental regulations regarding sulfur dioxide and mercury emissions and the anticipated acceleration in electric power utility construction which will use state-of-the-art filters to comply with EPA standards. Continued growth in demand for consumer air cleaners that incorporate cartridge HEPA filters will boost value gains for cartridge air filters, as will the development of market-specific filtration systems.

### Public utilities market dominant

Public utilities comprise the single largest market for air and fluid filters, holding just over one-third of demand in 2015. Utilities will also post one of the fastest gains of any key market through 2020, supported by greater pollution control equipment spending and greater municipal water

use. Continued strength in manufacturing output will buoy filter sales to industrial markets. Stricter air and water regulations, such as standards governing the disposal of effluent from hydraulic fracturing activity, will fuel sales growth in both the utilities and industrial markets. Consumers are concerned about the quality of both residential indoor air and municipal water supplies. In particular, the latter is stimulating demand for higher-value filters capable of removing heavy metals and biological contaminants. Gains in residential construction expenditures will promote sales of whole-house air cleaning systems and point-of-entry water filtration systems.

### Imports growing more rapidly than domestic production

Shipment growth in US air and fluid filters will be driven by many of the same factors that drive demand, since most filters used in the US are made domestically. However, imports will rise faster than domestic production, aided by climbing demand for less expensive products fabricated in countries with lower manufacturing costs. Many US filter suppliers have also set up production facilities abroad to target emerging markets, limiting growth in US exports.

### Study coverage

This study examines the US air and fluid filter industry. It provides historical demand data (2005, 2010, 2015) plus forecasts (2020 and 2025) by filtration technology (conventional filtration, filtration media, competitive technologies), product and market (utilities, consumer, industrial, other). The study also considers key market environment factors, details company market share and profiles 32 competitors in the US industry.

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## FILTRATION TECHNOLOGY

**Nonwoven Fabrics** -- Nonwoven fabrics are used in a variety of filters, including efficiency air filters, and water filters. Advanced nonwoven fabrics are being developed as a result of ongoing nonwoven fabric technological improvements for nonwoven air filters. For instance, new changes in air quality have increased the need for air pollution filters on electric power plants. Although there continue to be opportunities for growth for nonwoven filters used in biotechnology and healthcare applications, filter manufacturers and system suppliers often reluctant to adopt newer types of media because of additional costs involved in testing new materials to levels acceptable to the US Food and Drug Administration.

Growth in demand for nonwoven filter media is also driven by interest in multifunctional filter media. For instance, such nonwoven media can be created in multiple layers and in composite forms, which enable the media to act as a carrier for deodorizing materials such as baking soda or for chemicals that neutralize the acidity of oils and acids during their use.

Similar to paper filters, many nonwoven filters feature pleated media to increase the surface space available for collecting particulates. Although some nonwoven fabrics operate as surface filter media, others are configured to perform as depth media. Creating a nonwoven depth filter involves the use of somewhat more loosely arranged fibers so that the contaminants are caught inside the media instead of on the surface. In some filters, nonwoven fabrics are arranged in layers so that the outer layer is the most porous and the innermost layer has the best efficiency rating. In this way, larger particles are caught toward the outside of the

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TABLE V-5

### CONSUMER FILTER DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Households (million)					
\$ filters/household					
Consumer Filter Demand					
By Market:					
OEM					
Aftermarket					
By Type:					
Water					
Air					
% consumer					
Air & Fluid Filter Demand					

Source: The Freedonia Group

TABLE IV-2

### FLUID FILTER SUPPLY & DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil \$)					
\$ filters/mil \$ GDP					
Fluid Filter Demand					
Consumer Water					
Fluid Power					
Other Fluid					
- net imports					
Fluid Filter Shipments					
% fluid filters					
Air & Fluid Filter Shipments					

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

## Related Studies

### World Industrial Valves

World demand for industrial valves will rise 4.3 percent annually through 2019 to \$98.5 billion. Market growth in developing areas will outpace product demand in developed countries. The expansion and upgrading of water infrastructures will help sales increases. This study analyzes the \$80 billion world industrial valve industry, with forecasts for 2019 and 2024 by product and market for six world regions and 25 major countries. Total demand is given for an additional seven countries. The study also evaluates company market share and profiles industry players. #3369..... January 2016 ..... \$6300

### World Membrane Separation Technologies

World demand for membranes will rise 8.5 percent annually to \$26.3 billion in 2019. Industrializing countries such as India, China, Russia, Poland, and Brazil will show strong growth, while developed areas will remain intensive membrane users. Reverse osmosis, ultrafiltration, and nanofiltration will see above average growth. This study analyzes the \$17.5 billion global membrane industry, with forecasts for 2019 and 2024 by product and market for six world regions and 21 major countries. The study also evaluates company market share and profiles industry players. #3325..... September 2015 ..... \$6500

### Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players. #3281..... July 2015 ..... \$5500

### World Pumps

Global demand for fluid handling pumps is projected to increase 5.5 percent annually to \$84 billion in 2018. The Asia/Pacific region will remain the largest market and the second fastest growing, behind Central and South America. The key positive displacement and centrifugal pump segments will offer the best growth opportunities. This study analyzes the \$64.4 billion world pump industry, with forecasts for 2018 and 2023 by product, market, world region, and for 35 countries. The study also evaluates company market share and profiles industry participants. #3231..... January 2015 ..... \$6500

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

## About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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